

Project Ground Rules

Meeting/work session guidelines

- 1) Agendas are sent out in advance
- 2) If an invitee does not think they will provide value by attending the meeting, they should clarify with the organizer of the meeting on what the meeting organizers expectations were before declining the meeting invitation.
- 3) Meetings start and end on-time
- 4) All meeting attendees come prepared to meetings
- 5) All meeting attendees will be respectful to one another.
- 6) Side conversations should be limited during meeting
- 7) Meeting/work session notes are documented with the following:
 - a) Attendees
 - b) Notes/status (these may be notes to alternatives that were discussed for decisions and why a decision was made)
 - c) Decisions made
 - d) Action items (responsibility and due date)
 - e) Project manager updates work plan with action items

Document Review procedure

- 1) Documents sent out for review are distributed for a maximum of two days for review (unless a different timeframe is agreed upon by those involved in the review).
 - a) If an extension is needed for the review, need to ask author and project managers for the extension
 - b) Keep track changes on when reviewing documents
- 2) Who needs to review documents (this will be further defined in a responsibility assignment matrix)?

Notes: Review means providing feedback to the author within the specified timeframe:

 - a) Requirements
 - i) Developers
 - ii) Testers
 - iii) Project managers
 - iv) Business owners
 - b) Design documents
 - i) Product managers
 - ii) Business owners
 - iii) Testers
 - iv) Developers (peer review)
 - c) Test cases
 - i) Developers
 - ii) Product managers
 - iii) Testers (testers peer review)

Document Management:

- 1) All electronic documents related to Grants, Contracts, and Loans Management System project will be stored at [\\OFM018\APPS\GCLM](#)
- 2) Once a document is final (also called frozen or baselined) that document is stored under Visual Source Safe with the latest copy available (read-only) on the [\\OFM018\APPS\GCLM](#).
- 3) Changes to final documents will go through the change management process

Email Communications

- 1) When communicating via email use the following distribution list: OFM dl GCLM User Group
- 2) If directing the email to one or more people, include those names in the "To": field AND "cc" the distribution list
- 3) Send an acknowledgement in response to important email messages.

Time tracking:

- 1) All GCLM codes are recorded under:
 - a) TMS
 - i) Super Index 90019, 20044

Team Expectations

- 1) It is important that team members make and meet commitments.
- 2) When you've made a commitment you can't keep, let the team know as soon as possible.
- 3) Be willing to ask for help
- 4) Be willing to help others
- 5) Listen to what others are saying.
- 6) Strive to understand each other's perspectives, rather than jumping to conclusions.
- 7) Resolve problems without blaming.
- 8) Respect "do not disturb" signs on people's cubicles.
- 9) If you don't understand something, ask for clarification.
- 10) If you see a problem that others haven't noticed, bring it to someone's attention.